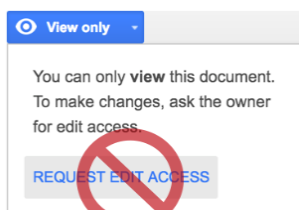




First-Time Managers

Client Handoff Agenda Template [Customer]

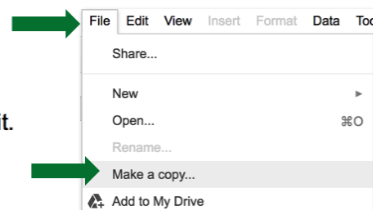


How to use this template:

This is a view-only file and cannot be edited.

Create your own copy of this template to edit.

In the menu, click **File > Make a copy...**



Internal Record Links:

Notes:

- Capture any additional information
- Why did they choose {company}?
- Tell us about the company culture.
- Did any key contacts complete a demo?

Information:	Description:
Hand-off date:	Mar 23, 2023
Kick-off date:	Mar 23, 2023
Go-Live date:	
Team:	Sales: IM: CSM: Product:
Primary client/vendor contacts:	Client:
Products:	
Price:	
Fee:	



First-Time Managers
